

BDDS Portal Provider Training 2:

*User Management
(for System Administrators)*

September 25, 2018



Provider User Management

Table of Contents

Note: Only System Administrators have full User Management access.

- Add New User
 - Step 1: Create Profile
 - Step 2: Assign Security Group
 - Step 3: Send Email Invitation
 - Step 4: View Status

- Edit User

- Change User's Password

- Inactivate User



Provider User Management

HOME

User Management

+ Add user

| First Name | Last Name | Status | Created | Last Edited | Group Memberships | Edit |
|------------|-----------------------------|---------|---------|-------------|---|------|
| Default | director@thetwcservices.com | Active | 8/24/18 | 9/4/18 | System Administrator,All Case(s) Access,Assigned Caseload | |
| Jane | Doe | Active | 9/4/18 | 9/4/18 | System Administrator,All Case(s) Access | |
| Bob | Smith | Active | 9/4/18 | 9/24/18 | All Case(s) Access,Assigned Caseload | |
| Lisa | Jones | Pending | 9/4/18 | 9/4/18 | Assigned Caseload | |
| John | Doe | Pending | 9/25/18 | 9/25/18 | | |

1 - 5 of 5 items

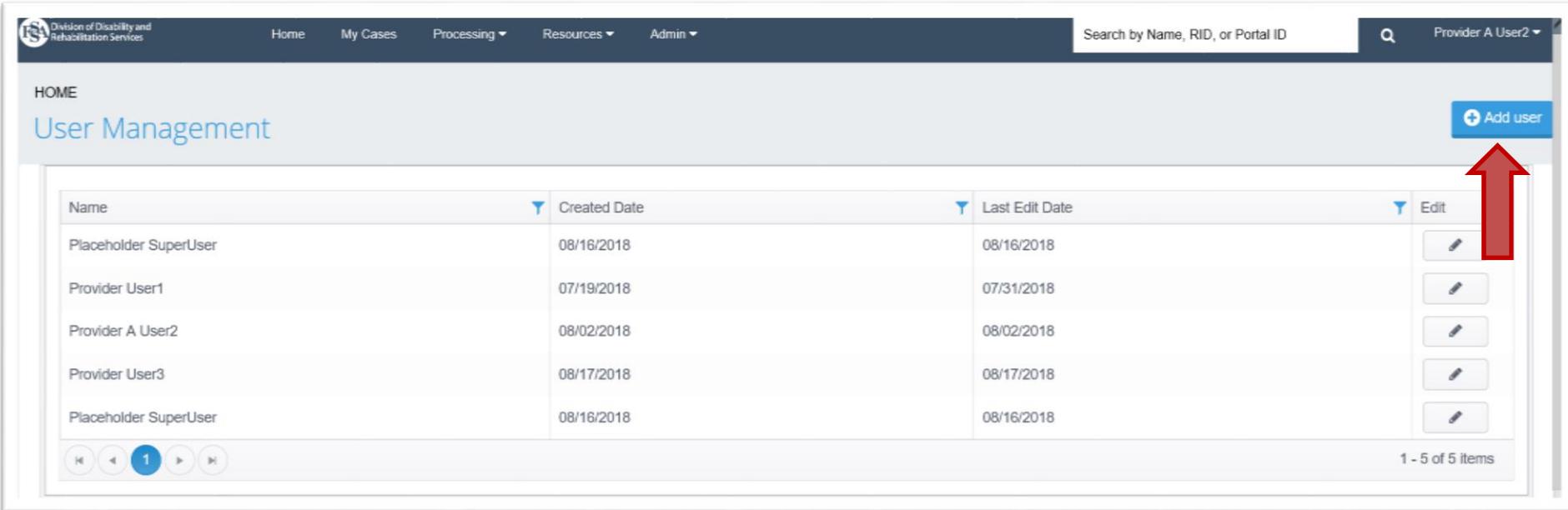
Select 'Users' from the Admin menu at-top.

View any existing users and add new user accounts.

You may review / update the name of your own account. It may initially be set to DEFAULT. To do so, click 'Edit' next to your name.



Provider User Mgmt. – Add New User



The screenshot displays the 'User Management' interface. At the top, there is a navigation bar with the logo for the 'Division of Disability and Rehabilitation Services' and menu items: Home, My Cases, Processing, Resources, and Admin. A search bar is located on the right, with the text 'Search by Name, RID, or Portal ID' and a search icon. The user's name 'Provider A User2' is displayed in the top right corner. Below the navigation bar, the page title 'HOME User Management' is shown. A blue button labeled '+ Add user' is positioned in the upper right corner of the main content area, with a red arrow pointing to it. The main content area contains a table with the following columns: Name, Created Date, Last Edit Date, and Edit. The table lists five users: Placeholder SuperUser, Provider User1, Provider A User2, Provider User3, and Placeholder SuperUser. The 'Edit' column contains edit icons for each user. At the bottom of the table, there are navigation controls (back, first, 1, second, last, forward) and a pagination indicator '1 - 5 of 5 items'.

| Name | Created Date | Last Edit Date | Edit |
|-----------------------|--------------|----------------|------|
| Placeholder SuperUser | 08/16/2018 | 08/16/2018 | |
| Provider User1 | 07/19/2018 | 07/31/2018 | |
| Provider A User2 | 08/02/2018 | 08/02/2018 | |
| Provider User3 | 08/17/2018 | 08/17/2018 | |
| Placeholder SuperUser | 08/16/2018 | 08/16/2018 | |

Select 'Add User' button on upper right corner of screen



Add New User: Step 1 – Create Profile

Enter profile info for the new user. * Designates required fields.

HOME > USER MANAGEMENT

Edit User

* First Name

Middle Name

* Last Name

* Email Address

Phone Number

Phone Number 2

* Status

* Login

Group Membership Save User to add Security Groups

Invitations Save User to send Invitation

Important Note about LOGIN IDs

The unique Login can never be changed. Review what you enter here for accuracy before clicking save.

All other fields can be edited.

TIP: It's best practice to make the user's login the same as their email address.

When complete, click 'Save.'



Add New User: Step 2 – Add Security Group

HOME > USER MANAGEMENT

Edit User

- John Smith

* First Name

Middle Name

* Last Name

* Email Address

Phone Number

Phone Number 2

* Status

* Login

Group Membership

| Security Group | Delete |
|---------------------|--------|
| No items to display | |

Invitations

| Email | Email Sent | Email Expiration Date | Invitation Accepted |
|---------------------|------------|-----------------------|---------------------|
| No items to display | | | |

IMPORTANT! Next, you must ADD SECURITY GROUP.
This will give the user permissions. DO NOT skip this step.



Add New User: Step 2 – Add Security Group

SECURITY GROUPS

Determine which role to assign to the user from the following options:

- **System Administrator** - User Management (set-up/edit users), Caseload Management (assign cases to users), Access to All Cases
- **All Case(s) Access** - Caseload Management (assign cases to users), Access to All Cases
- **Assigned Caseload** - Access to assigned cases only



Add New User: Step 2 – Add Security Group

Add Security Groups ×

| | SECURITY GROUP |
|--------------------------|----------------------|
| <input type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | All Case(s) Access |
| <input type="checkbox"/> | Assigned Caseload |

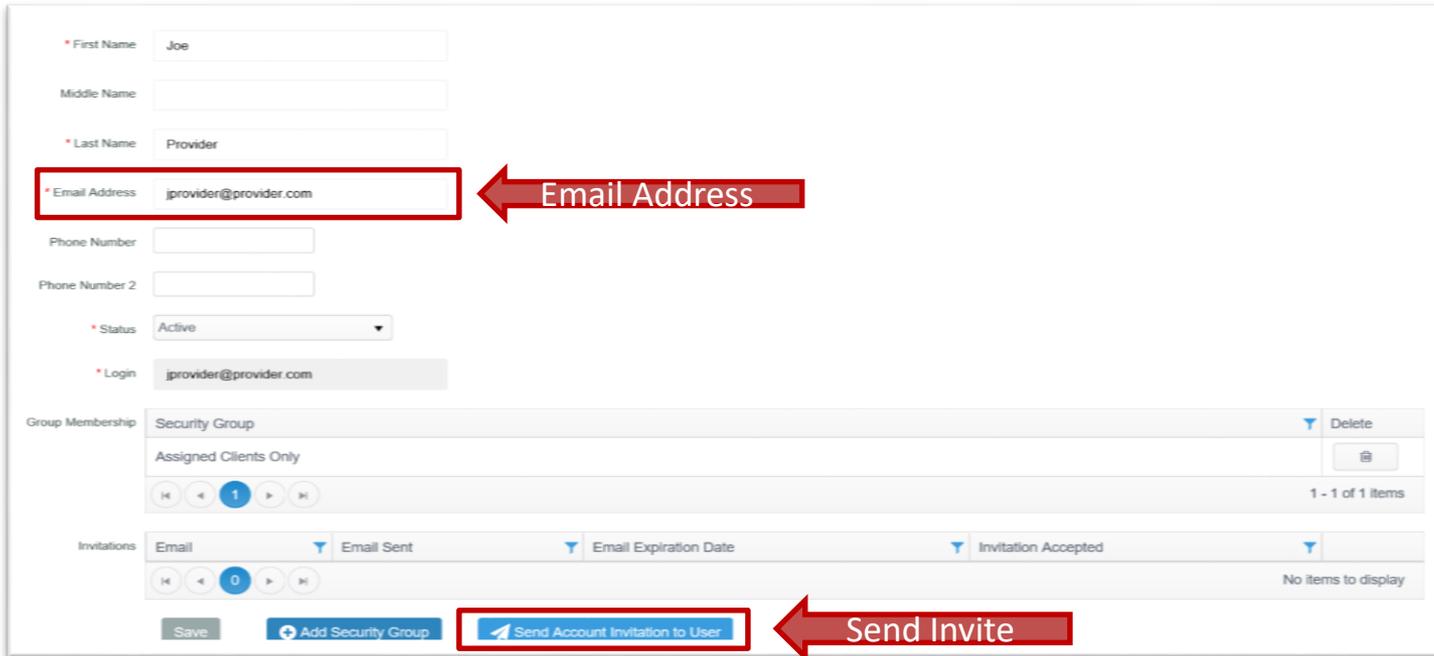
Select the appropriate Security Group (you only need to select one)

Then, click 'Save'



Add New User: Step 3 – Send Invitation

Now, click 'SEND ACCOUNT INVITATION' to send email invitation to new user.



The screenshot shows a user profile form with the following fields and actions:

- First Name: Joe
- Middle Name: (empty)
- Last Name: Provider
- Email Address: jprovider@provider.com (highlighted with a red box and an arrow labeled "Email Address")
- Phone Number: (empty)
- Phone Number 2: (empty)
- Status: Active (dropdown menu)
- Login: jprovider@provider.com
- Group Membership: Security Group (dropdown menu), Assigned Clients Only (checkbox), 1 - 1 of 1 items (pagination)
- Invitations: Email (dropdown menu), Email Sent (dropdown menu), Email Expiration Date (dropdown menu), Invitation Accepted (dropdown menu), No items to display (text)
- Buttons: Save, Add Security Group, Send Account Invitation to User (highlighted with a red box and an arrow labeled "Send Invite")

The Invitation to the BDDS Portal (Account Activation) will be sent to the email address entered in the profile.

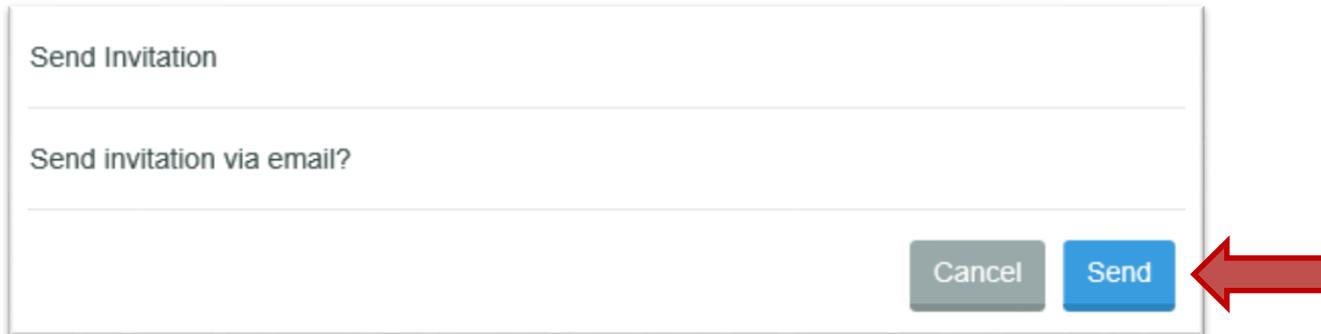
NOTE: this could be different than the login you assign but it's best practice for these to be the same.

You can edit the email address and resend the invitation if need be.



Add New User: Step 3 – Send Invitation

A message will appear asking you to confirm whether you want to send the invitation.



The screenshot shows a dialog box titled "Send Invitation". Below the title is a horizontal line. Underneath that line is the text "Send invitation via email?". At the bottom right of the dialog box are two buttons: a grey "Cancel" button and a blue "Send" button. A red arrow points to the "Send" button.

Clicking 'Send' will return you to the user's profile where you can view that an invitation email was sent. The invitation is valid for 30 days.

If the user does not Activate their Account within 30 days, you can resend the invitation using the 'Send Account Invitation to User' button.

Reminder: If you update the user's email address, you can resend an invitation for the same account/login ID to the new email address.



Add New User: Step 3 – Send Invitation

From: BDDSPortalAccess@fssa.in.gov [mailto:BDDSPortalAccess@fssa.in.gov]

Sent: Wednesday, August 29, 2018 3:36 PM

To: Jane Doe

Subject: Your Invitation to the BDDS Portal

Provider Agency: Sample Provider Agency

Welcome! A new user account for the BDDS Portal has been created for you.

Action is required to complete your account set-up.

Click on this unique link to create a password and activate your account → [BDDS Portal One-Time Account Activation](#)

After initial activation of your account, you may want to bookmark this URL for direct access to the system:

BDDS PORTAL Website → <https://cmportal.fssa.in.gov>

For reference, your login is: test@test.com

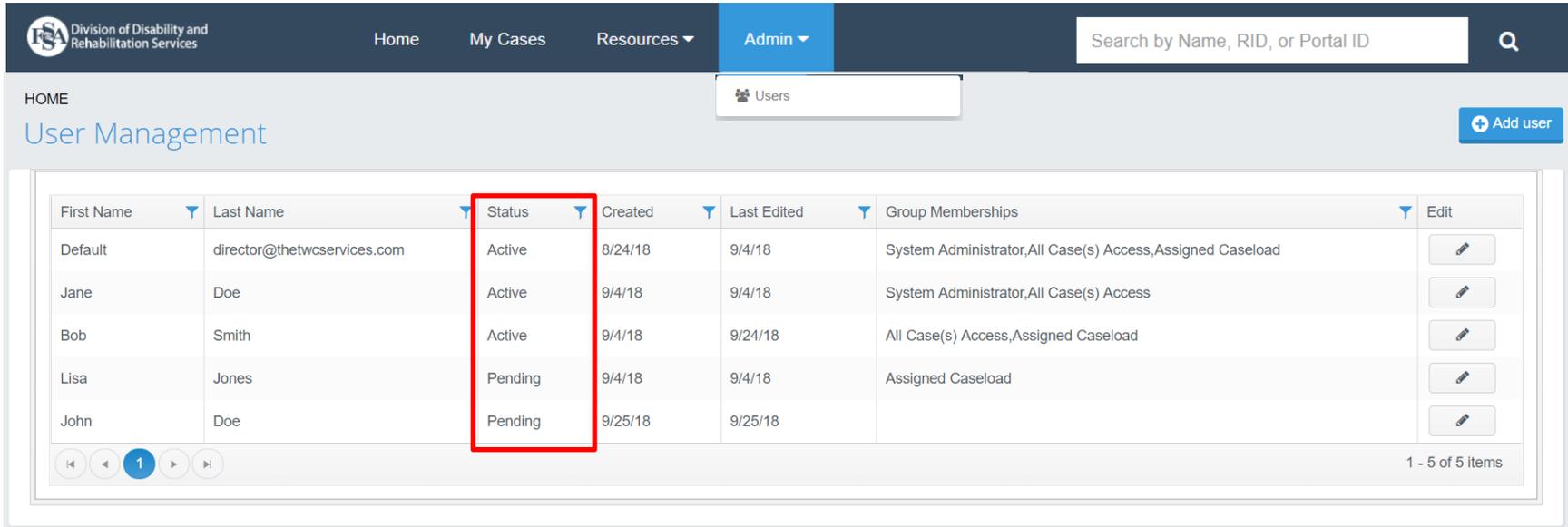
Your account activation link will expire in 30 days. If you have questions or your link has expired, please contact your system administrator. System administrators may submit JIRA tickets if further assistance is needed from the BDDS helpdesk.

DO NOT REPLY TO THIS EMAIL. This inbox is not monitored and your message may be automatically discarded.

Sample Email Invitation that's automatically sent to new user.



Add New User: Step 4 – View Status



The screenshot shows the 'User Management' interface in the BDDS Portal. The 'Admin' menu is selected, and the 'Users' dropdown is visible. The main grid displays a list of users with columns for First Name, Last Name, Status, Created, Last Edited, Group Memberships, and Edit. The 'Status' column is highlighted with a red box. The users listed are: Default (Active), Jane Doe (Active), Bob Smith (Active), Lisa Jones (Pending), and John Doe (Pending). The 'Add user' button is located in the top right corner.

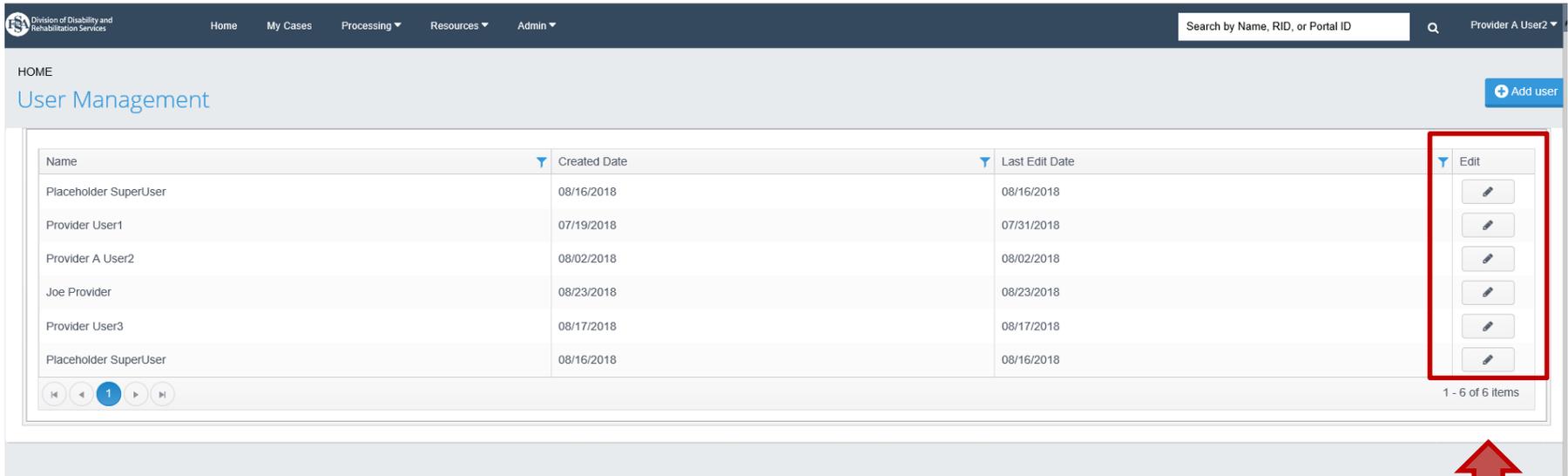
| First Name | Last Name | Status | Created | Last Edited | Group Memberships | Edit |
|------------|-----------------------------|---------|---------|-------------|---|------|
| Default | director@thetwcservices.com | Active | 8/24/18 | 9/4/18 | System Administrator, All Case(s) Access, Assigned Caseload | |
| Jane | Doe | Active | 9/4/18 | 9/4/18 | System Administrator, All Case(s) Access | |
| Bob | Smith | Active | 9/4/18 | 9/24/18 | All Case(s) Access, Assigned Caseload | |
| Lisa | Jones | Pending | 9/4/18 | 9/4/18 | Assigned Caseload | |
| John | Doe | Pending | 9/25/18 | 9/25/18 | | |

Once you've sent an invitation, view the user's status on the main User Management grid.

- Active = User successfully completed Account Activation and can access BDDS Portal
- Pending = Account Activation not complete
- Inactive = Account inactivated by System Administrator



Provider User Mgmt.- Edit User



The screenshot displays the 'User Management' page in a web application. The page header includes the logo for the 'Division of Disability and Rehabilitation Services' and navigation links for 'Home', 'My Cases', 'Processing', 'Resources', and 'Admin'. A search bar is located in the top right corner, and the current user is identified as 'Provider A User2'. The main content area features a table with the following columns: 'Name', 'Created Date', 'Last Edit Date', and 'Edit'. The table lists six users, with the 'Edit' column containing a pencil icon for each row. A red box highlights the 'Edit' column, and a red arrow points to it from below. The table footer shows '1 - 6 of 6 items'.

| Name | Created Date | Last Edit Date | Edit |
|-----------------------|--------------|----------------|---|
| Placeholder SuperUser | 08/16/2018 | 08/16/2018 |  |
| Provider User1 | 07/19/2018 | 07/31/2018 |  |
| Provider A User2 | 08/02/2018 | 08/02/2018 |  |
| Joe Provider | 08/23/2018 | 08/23/2018 |  |
| Provider User3 | 08/17/2018 | 08/17/2018 |  |
| Placeholder SuperUser | 08/16/2018 | 08/16/2018 |  |

You can update user profile info or Security Group permissions by clicking the edit button to the right of the user.



Provider User Mgmt.- Edit User

HOME > USER MANAGEMENT

Edit User

- John Smith

* First Name

Middle Name

* Last Name

* Email Address

Phone Number

Phone Number 2

* Status

* Login

Group Membership

| Security Group | Delete |
|--------------------|---|
| All Case(s) Access |  |

Invitations

| Email | Email Sent | Email Expiration Date | Invitation Accepted |
|---------------------|------------|-----------------------|---------------------|
| No items to display | | | |

All profile info is editable except for the login.

You can remove security group permissions using the trash can next to the group you wish to remove.

Users must have at least one security group assigned.



Provider User Mgmt. - Edit User: Change Password

HOME > USER MANAGEMENT

Edit User

* First Name

Middle Name

* Last Name

* Email Address

Phone Number

Phone Number 2

* Status

* Login

Password

Confirm Password

To change / reset a user's password →

1. Users
2. Edit User
3. Enter new password / confirm password
4. Save

Then, communicate the new password to the user outside of the system.

You don't need their current password to make a change.

System Administrators: If you forget your own password, submit a JIRA ticket. Alternatively, ask another System Admin at your Agency to reset it for you.



Provider User Mgmt.- Inactivate User

HOME > USER MANAGEMENT

Edit User

Last Name: Doe

Email Address: john.doe@together.com

Phone Number:

Phone Number 2:

Status: Inactive (Selected) | Active

Group Membership: Security Group

Assigned Caseload: 1 - 1 of 1 items

| Email | Email Sent | Email Expiration Date | Invitation Accepted |
|-----------------------|------------|-----------------------|---------------------|
| john.doe@together.com | 9/4/18 | 10/04/18 11:34 AM | |

Buttons: Save, Add Security Group, Send Account Invitation to User



IMPORTANT: It is your responsibility to inactivate staff / users who are no longer with your Agency. Until their status is changed to Inactive, they will have access to the BDDS Portal.

To do so, from the Edit User screen, change Status from Active to Inactive.



BDDS Portal Trainings

<https://www.in.gov/fssa/ddrs/5437.htm>

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions

